



**Centers for Medicare & Medicaid Services
eXpedited Life Cycle (XLC)**

Enterprise Privacy Policy Engine (EPPE)



EPPE User Registration Process

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EPPE Overview

The Enterprise Privacy Policy Engine (EPPE) system automates the process of submitting Data Use Agreement (DUA) requests and tracking their status through the approval and data receipt stages. End users, (requesters and all CMS approvers), can interactively use the system to manage their DUAs. For those requests that require supporting documentation, it allows documents to be uploaded and then later downloaded for review.

The EPPE Application processes the following 4 DUA Customer Types:

- Contractor
- Limited Data Sets
- Researcher
- Non-DUA Tracking Requests

This training will guide you through the steps necessary to gain access to the EPPE system.

IDM Overview

IDM – Introduction

The Identity Management system (IDM) is an identity management and services system that provides users with access to CMS applications. CMS established IDM to provide business partners with a means to create a single User ID that they can use to access one or more CMS applications.

To apply and receive an IDM User ID, complete the steps that follow.

Multi-Factor Authentication (MFA) Overview

Multi-Factor Authentication (MFA) is generally required to access CMS sensitive data. MFA uses a combination of two (or more) different token attributes (also known as factors), to authenticate the user. The EPPE Application requires two types of authentication.

- The first factor is what users know. This is usually a password, but this can also include a user response to a secret challenge question. (This is generally known as Knowledge Based Authentication, and by itself, is insufficient for authentication to most CMS sensitive information.)
- The second factor is what users have. This could be a physical object (hard token), for example, a smart card, or hardware token that generates one-time-only passwords. It might also be some encrypted software token (soft token) installed on an individual's system (usually with very limited functional parameters for use).

Note: Some MFA options require the installation of an application on a smartphone.

Multi-Factor Authentication (MFA) Overview Cont.

The available MFA Options are listed below:

- **Email** – This is the default option that is initially used to access IDM for the first time. Once the user logs in successfully, the user can specify any or all of the other MFA options through a profile update or continue to use email. Email is the only option that cannot be removed and will always remain on your profile.
- **Short Message Service (SMS)** – The SMS option will send your MFA Code directly to your mobile device via a text message. This option requires you to provide a ten-digit U.S. phone number for a mobile device that is capable of receiving text messages. A carrier service charge may apply for this option.
- **Interactive Voice Response (IVR)** – The IVR option will communicate your MFA Code through a voice message that will be sent directly to your phone. This option requires you to provide a valid 10-digit U.S. phone number and (optional) extension that will be used during login to obtain the MFA Code.
- **Google Authenticator** – The Google Authenticator is an application for your smart phone that generates security codes. You will be asked for a security code whenever you need to verify your identity. Supported phones include iPhone, Android Phone, and Blackberry (a download to user's smartphone is required).
- **Okta Verify** – The Okta Verify option produces push notifications which enable you to verify your identity with a single tap on your mobile device, without the need to type a code. Supported phones include iPhone, Android Phone, and Windows Phone (a download to user's smartphone is required).

EPPE Registration Process

EPPE is accessible through the CMS Enterprise Portal by using a valid Identity Management (IDM) User ID.

Note: Users must use an IDM User ID, not an Enterprise User Administration (EUA) User ID, to access the EPPE application.

EPPE Registration Process Cont.

Steps to Register

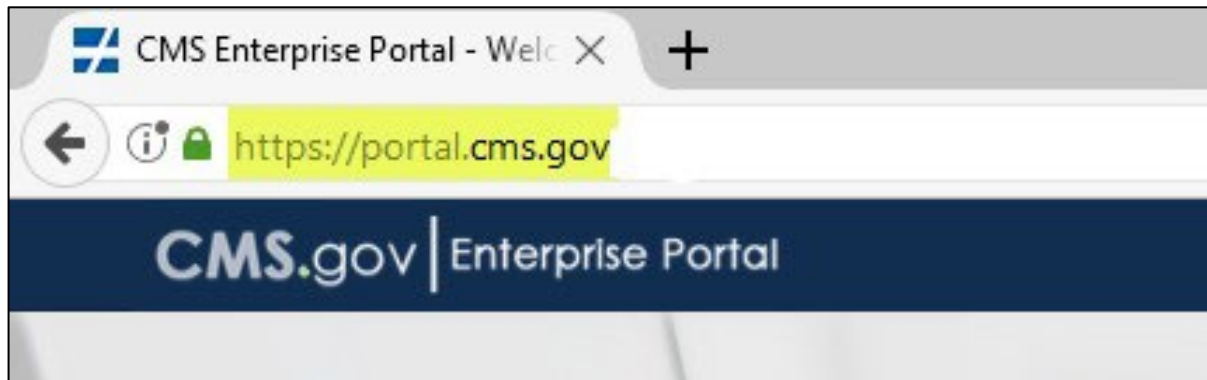
Step 1: IDM Registration – This step will guide you through creating your IDM profile, which will require both your personal and business-related information.

Step 2: Requesting Access to the EPPE Application – This step will guide you through requesting the EPPE User Role in the Enterprise Portal including Remote Identity Proofing (RIDP).

Step 3: Requesting an EPPE Application Role – This step will guide you through requesting your EPPE Application Role e.g., DUA Requester, CMS Contact (COR), etc.

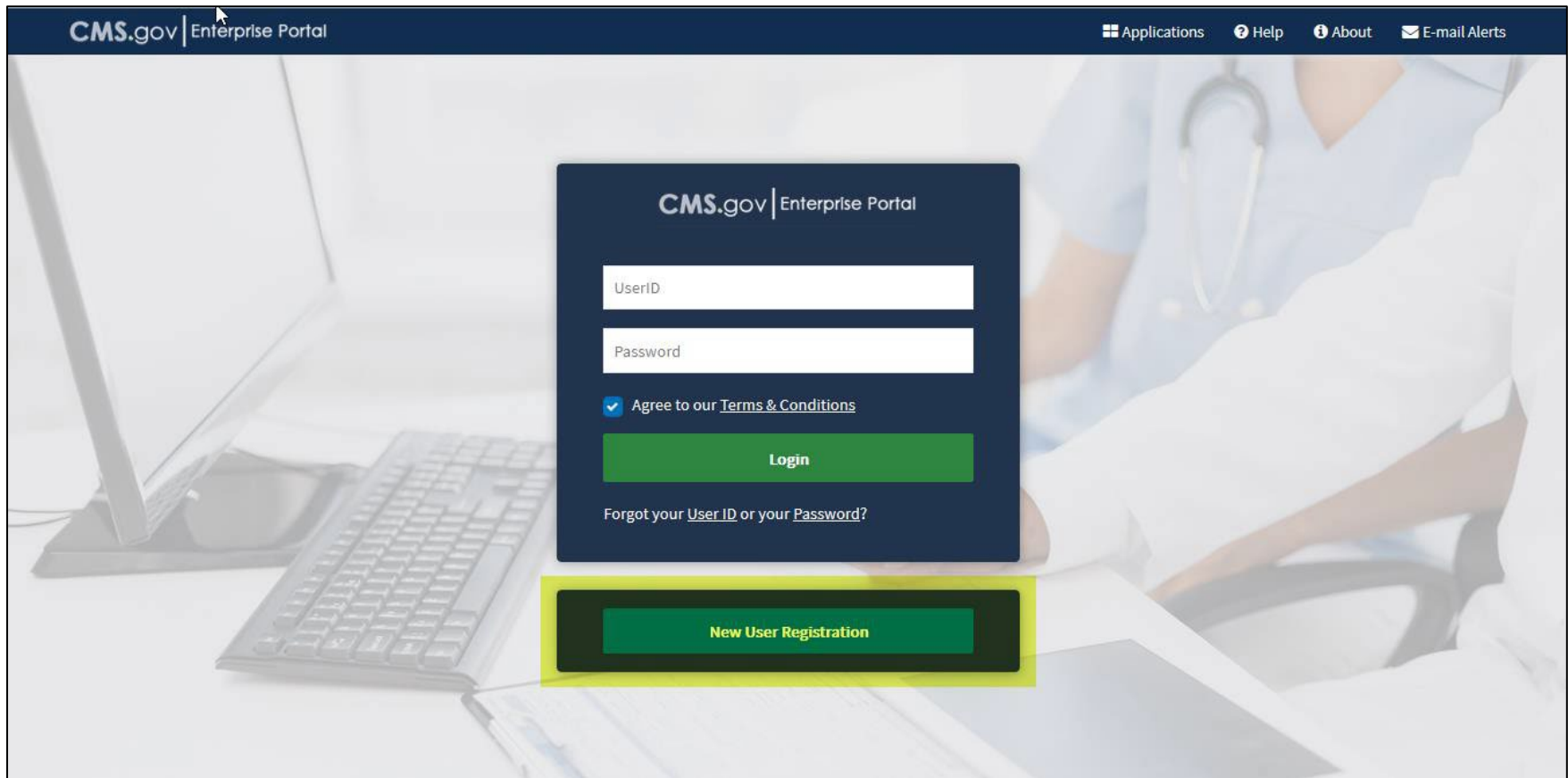
IDM Registration URL Address

Enter the following URL in your browser's address box: <https://portal.cms.gov>



IDM Registration Login Page

The **CMS Enterprise Portal** page displays.



The screenshot shows the CMS.gov Enterprise Portal login and registration interface. The page has a dark blue header with the CMS.gov logo and 'Enterprise Portal' text on the left, and navigation links for Applications, Help, About, and E-mail Alerts on the right. The main content area features a dark blue login box with input fields for UserID and Password, a checkbox for 'Agree to our Terms & Conditions', a green 'Login' button, and a link for 'Forgot your User ID or your Password?'. Below the login box is a yellow-bordered box containing a green 'New User Registration' button. The background of the page shows a blurred image of a healthcare professional in scrubs with a stethoscope, sitting at a desk with a computer monitor and keyboard.

CMS.gov | Enterprise Portal

Applications Help About E-mail Alerts

CMS.gov | Enterprise Portal

UserID

Password

☒ Agree to our [Terms & Conditions](#)

Login

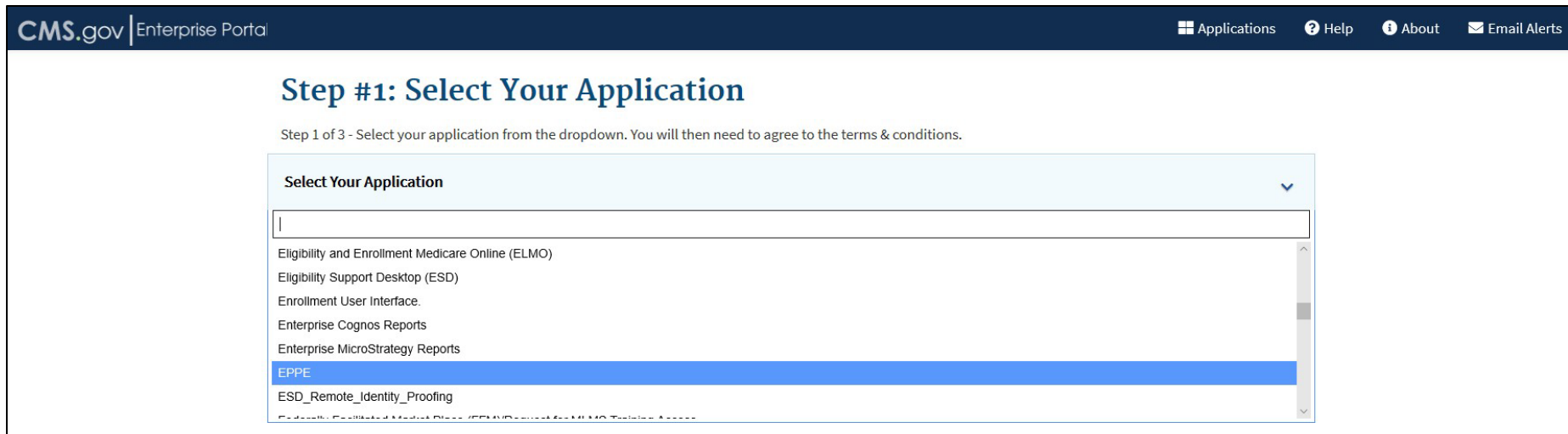
[Forgot your User ID or your Password?](#)

New User Registration

Click on **New User Registration**.

IDM Registration Application Selection

The **Step #1: Select Your Application** page displays.



The screenshot shows the CMS.gov Enterprise Portal interface. The header includes the CMS.gov logo, 'Enterprise Portal', and navigation links for Applications, Help, About, and Email Alerts. The main heading is 'Step #1: Select Your Application'. Below this, a subheading reads 'Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.' A dropdown menu titled 'Select Your Application' is open, displaying a list of applications. The applications listed are: Eligibility and Enrollment Medicare Online (ELMO), Eligibility Support Desktop (ESD), Enrollment User Interface, Enterprise Cognos Reports, Enterprise MicroStrategy Reports, EPPE (which is highlighted in blue), ESD_Remote_Identity_Proofing, and Enterprise Enrollment Management (EEM) System for LMS Testing Access.

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

Select Your Application

- Eligibility and Enrollment Medicare Online (ELMO)
- Eligibility Support Desktop (ESD)
- Enrollment User Interface
- Enterprise Cognos Reports
- Enterprise MicroStrategy Reports
- EPPE**
- ESD_Remote_Identity_Proofing
- Enterprise Enrollment Management (EEM) System for LMS Testing Access

Select **EPPE**.

Note: Each time EPPE is accessed, the User ID and Password need to be entered; users must agree to the Terms and Conditions; and the MFA Security Code must be entered.

IDM Registration Terms & Conditions

The **Terms & Conditions** display.

The screenshot shows the CMS.gov Enterprise Portal interface. At the top, the header includes the CMS.gov logo and 'Enterprise Portal' on the left, and navigation links for Applications, Help, About, and Email Alerts on the right. The main content area is titled 'Step #1: Select Your Application' and includes a sub-instruction: 'Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.' Below this is a dropdown menu with 'EPPE' selected. A 'Terms & Conditions' section is displayed, showing OMB No. 0938-1236, an expiration date of 03/31/2021, and a link to the Paperwork Reduction Act. Underneath is a 'Consent to Monitoring' section with a paragraph of text and a checkbox labeled 'I agree to the Terms & Conditions'. At the bottom right, there are 'Next' and 'Cancel' buttons.

Place a checkmark in the
I agree to the Terms & Conditions check box.

Click **Next**.

IDM Registration Your Information Page

The **Step #2: Register Your Information** page displays.

CMS.gov | Enterprise Portal Applications Help About Email Alerts

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.
All fields are required unless marked (optional).

Enter First Name Enter Middle Name (optional) Enter Last Name Suffix (optional)

Birth Month Birth Date Birth Year

Is Your Address U.S. Based?
☒ Yes ☐ No

Enter Home Address Line 1 Enter Home Address Line 2 (optional)

Enter City Select State Enter ZIP Code Enter ZIP+4 (optional)

Enter Email Address Confirm Email Address

Enter Phone Number

Complete all required information on the **Register Your Information** page.

Click **Next**.

Note: Please provide your business email address. All other information provided should be your personal information.

IDM Registration User ID

The **Step #3: Create User ID, Password & Security Question/Answer** page displays.

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

User ID Requirements

- Must be between 6 - 74 characters and contain at least one letter.
- Can contain alphanumeric characters.
- Allowed special characters are limited to hyphens (-), underscores (_), apostrophes ('), and periods (.).
- The @ symbol is allowed only if the User ID is in a valid email address format (j.doe@abc.edu or 123@abc.com).
- Cannot contain 9 consecutive numbers.
- Cannot begin or end with special characters.
- Cannot contain more than 1 consecutive special character.

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

All fields are required unless marked (optional).

Enter User ID

Required field.

Enter Password

Confirm Password

Security answer to be used in case you forget your password or you need to unlock your account.

Select Security Question

Enter Security Answer

Back

Next

Cancel

Enter the **User ID**.

IDM Registration Password

The **Step #3: Create User ID, Password & Security Question/Answer** page displays.

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

All fields are required unless marked (optional).

Password Requirements

- Password must be changed every 60 days.
- Password must be a minimum of 15 characters.
- Password must contain: 1 upper case, 1 lower case letter and 1 number.
- The following special characters may not be used <> () * " ' / \ (space).
- Password cannot contain: Parts of User ID, First Name, Last Name, common passwords.
- Password can only be changed once every 24 hours.
- Password must be different from last 6 passwords.

User ID

John.Smith

Enter Password

Confirm Password

Select Security Question

Enter Security Answer

Back

Next

Cancel

Enter the **Password** and confirm the **Password**.

IDM Registration Security Question and Answer

The **Step #3: Create User ID, Password & Security Question/Answer** page displays.

The screenshot shows the 'Step #3: Create User ID, Password & Security Question/Answer' page. The header includes 'CMS.gov | Enterprise Portal' and navigation links for 'Applications', 'Help', 'About', and 'Email Alerts'. The main heading is 'Step #3: Create User ID, Password & Security Question/Answer'. Below it, instructions state: 'Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer. All fields are required unless marked (optional).' The form contains several fields: 'User ID' with the value 'John.Smith', 'Enter Password' and 'Confirm Password' fields with masked characters and eye icons, a 'Security Question' dropdown menu showing 'What is your favorite movie quote?', and an 'Enter Security Answer' text field. A red border and 'Required field.' message are around the answer field. A 'Security Answer Requirements' sidebar lists rules: alphanumeric characters, spaces, minimum 4 characters, and no part of the question. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

CMS.gov | Enterprise Portal

Applications Help About Email Alerts

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.
All fields are required unless marked (optional).

User ID
John.Smith

Enter Password
.....

Confirm Password
.....

Security answer to be used in case you forget your password or you need to unlock your account.

Security Question
What is your favorite movie quote?

Enter Security Answer

Required field.

Back Next Cancel

Security Answer Requirements

- Can contain alphanumeric characters.
- Can contain spaces.
- Must be at least 4 characters.
- Cannot contain part of the security question.

Your Security Answer will be required in order to reset your password or unlock your account.

Select a **Security Question**
and enter **Security Answer**.

Click **Next**.

IDM Registration Summary

CMS.gov | Enterprise Portal Applications Help About Email Alerts

New User Registration Summary

Please review your information and make any necessary changes before submitting.

EPPE

All fields are required unless marked (optional).

First Name: EPPE, Enter Middle Name (optional), Last Name: User, Suffix (optional)

Birth Month: January, Birth Date: 1, Birth Year: 1960

Home Address Line 1: Home Address One, Enter Home Address Line 2 (optional)

City: City, State: Maryland, ZIP Code: 21075, Enter ZIP+4 (optional)

Email Address: eppeuser1@eppe.com, Confirm Email Address: eppeuser1@eppe.com

Phone Number: 410-410-4100

All fields are required unless marked (optional).

User ID: eppeuser1

Password: ••••••, Confirm Password: ••••••

Select Your Security Question: What music album or song did you first purchase?

Security Answer: pruc

Submit User Cancel

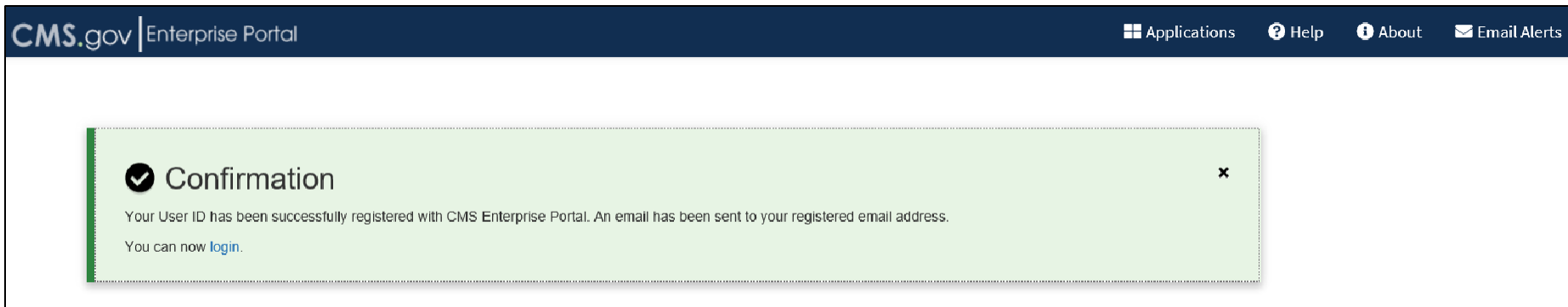
The **Registration Summary** page displays.

Please review the entered information and then click on **Submit User**.

Note: Verify that you provided your **business email address**. The remaining information must be your personal information.

IDM Registration Confirmation

The **Confirmation** page displays.



The Confirmation message, ***“Your User ID has been successfully registered with CMS Enterprise Portal. An email has been sent to your registered email address. You can now login.”*** displays.

The IDM registration process is now complete. You will receive an email notifying you of the successful creation of your account.

Requesting Access To The EPPE Application

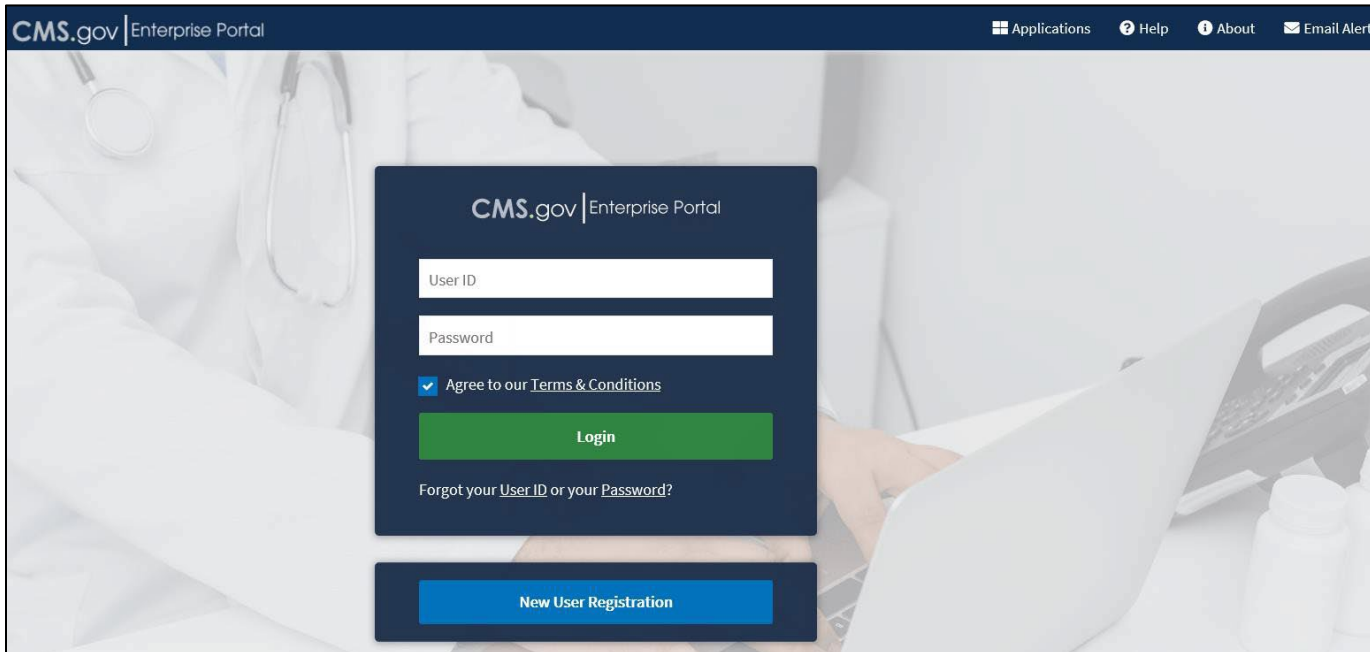
Requesting EPPE Access/User Role



Please Note: Users must have received the IDM registration approval email prior to requesting access to EPPE.

Requesting Access – Login Page

After receiving the IDM approval email go to the **Enterprise Portal** webpage: <https://portal.cms.gov>



CMS.gov | Enterprise Portal

Applications Help About Email Alerts

CMS.gov | Enterprise Portal

User ID

Password

☒ Agree to our [Terms & Conditions](#)

Login

[Forgot your User ID or your Password?](#)

New User Registration

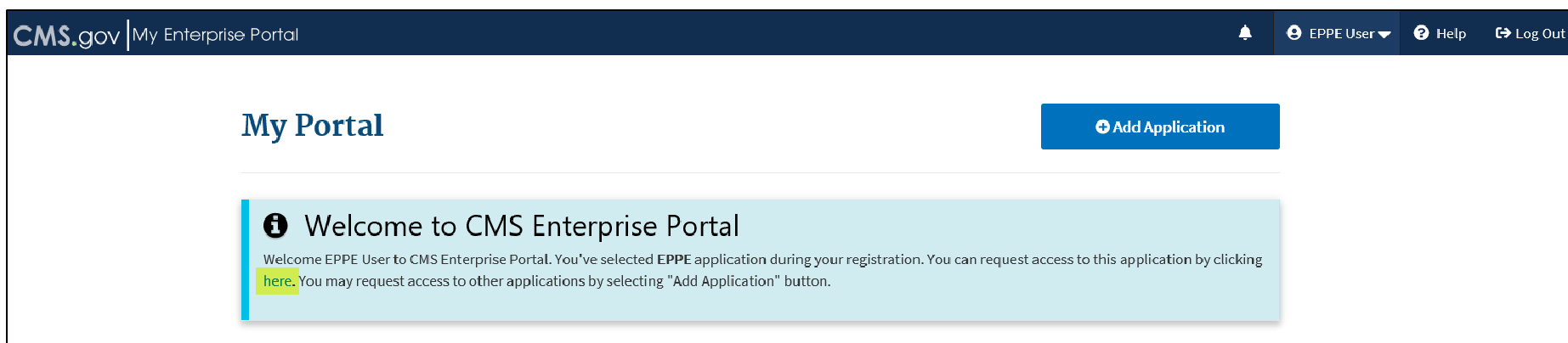
Enter **User ID** and **Password**.

Click on the checkbox to **Agree to our Terms & Conditions**.

Click **Login**.

Requesting Access – My Portal

The **My Portal** page displays.



Click on **“here”** to request access to the EPPE application.

Requesting Access – Role Selection

The **Request Application Access** page displays.

Request Application Access

1 Select an Application

✓ EPPE

2 Select a Role

Select a Role

- EPPE Business Owner Representative
- EPPE Administrator
- EPPE Helpdesk
- EPPE Microstrategy User
- EPPE User**

3 Enter Reason for Request

Completed [Edit](#)

[Cancel](#)

The **Select an Application** field is populated by default.

Click on the **Select a Role** field and select **EPPE User** from the drop-down.

Requesting Access – Role Selection Cont.

The **Request Application Access** page displays.

CMS.gov | My Enterprise Portal

My Apps

EPPE User

Help

Log Out

Request Application Access

- 1 Select an Application**
✓ EPPE
Completed [Edit](#)
- 2 Select a Role**
Role:
EPPE User
Uses the EPPE system to perform Data Use Agreement functions.
Next
- 3 Complete Identity Verification**
- 4 Enter Role Details**
- 5 Enter Reason for Request**

Cancel

After selecting the **EPPE User** role, click **Next**.

Requesting Access Identity Verification

The **Request Application Access** page displays.

The screenshot shows the 'Request Application Access' page on the CMS.gov My Enterprise Portal. The page has a dark blue header with the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a notification bell, 'EPPE User', 'Help', and 'Log Out'. The main content area is white and features a section titled 'Request Application Access'. Below this title is a list of five steps: 1. Select an Application, 2. Select a Role, 3. Complete Identity Verification, 4. Enter Role Details, and 5. Enter Reason for Request. Steps 1 and 2 are marked as 'Completed' with green checkmarks and 'Edit' links. Step 3 is the current step and is highlighted with a light blue background. It contains a sub-section 'Identity Verification' with an information icon and a text box explaining that this role requires additional verification and that the user should select 'Launch' to begin the process. A green 'Launch' button is located at the bottom right of this section. Steps 4 and 5 are currently empty. A 'Cancel' link is at the bottom right of the page.

Request Application Access

- 1 Select an Application
✓ EPPE
Completed [Edit](#)
- 2 Select a Role
✓ EPPE User
Completed [Edit](#)
- 3 Complete Identity Verification
i Identity Verification
This role requires an additional level of verification. You will be asked to provide additional information to verify your identity. Please select "**Launch**" to begin the identity verification process. You will return to the next step below when identity verification is complete.
Launch
- 4 Enter Role Details
- 5 Enter Reason for Request

[Cancel](#)

Click **Launch** to start the **Identity Verification** process.

Requesting Access – Experian Identity Verification

The Experian identity verification service will use the user's core credentials to locate their personal information in Experian and generate a set of questions, referred to as out-of-wallet questions. Experian will attempt to verify their identity to the appropriate level of assurance with the information they provided. Most users are able to complete the ID proofing process in less than five minutes. If users encounter problems with RIDP, they will be asked to contact Experian Support Services via phone to resolve any issues.

The Experian identity verification is a required step to access the EPPE system and must be completed.

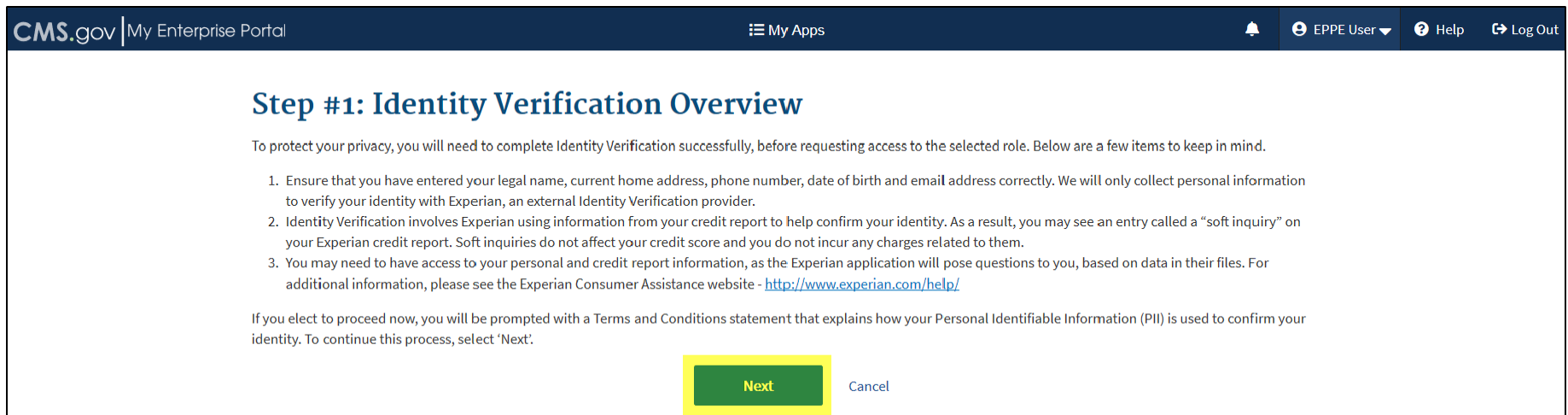
Requesting Access – Experian Identity Verification Cont.

Users may have already encountered Remote Identity Proofing (RIDP) through various interactions with banking systems, credit reporting agencies, and shipping companies. The Experian identity verification service is used by CMS to confirm your identity when users access a protected CMS Application. When users log into the CMS system and request access to EPPE, they will be prompted to RIDP if they have not been previously identity proofed to the level of assurance required by the EPPE application. **RIDP will not impact the user's credit.** Users will be asked to provide a set of core credentials which include:

- Full Legal Name
- Social Security Number
- Date of Birth
- Current Residential Address
- Personal Phone Number

Requesting Access – Identity Verification Step 1

The **Identity Verification Overview** page displays.

The screenshot shows the top navigation bar of the CMS.gov My Enterprise Portal. The header includes the CMS.gov logo, a hamburger menu icon, and links for My Apps, notifications, user profile (EPPE User), help, and log out. The main content area is titled 'Step #1: Identity Verification Overview'. It contains a paragraph explaining that identity verification is required for privacy protection before requesting access. Below this are three numbered steps: 1. Ensure correct entry of personal information for Experian verification. 2. Understand that Experian uses credit report information for identity confirmation, resulting in a 'soft inquiry' on the credit report. 3. Note that access to personal and credit report information is required for the Experian application, which may pose questions based on their data. A link to the Experian Consumer Assistance website is provided. At the bottom, there is a green 'Next' button and a 'Cancel' link. The 'Next' button is highlighted with a yellow border in the original image.

CMS.gov | My Enterprise Portal

☰ My Apps

🔔 EPPE User ▼ ? Help ↗ Log Out

Step #1: Identity Verification Overview

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

1. Ensure that you have entered your legal name, current home address, phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a “soft inquiry” on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website - <http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select 'Next'.

Next Cancel

Click **Next**.

Requesting Access Identity Verification Step 2

The **Accept Terms & Conditions** page displays.

CMS.gov | My Enterprise Portal

My Apps

EPPE User

Help

Log Out

Step #2: Accept Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | (OMB Re-Certification Pending) | [Paperwork Reduction Act](#)

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rules of Behavior for Privileged User Accounts (addendum to the HHS Rules of Behavior (HHS PoB) document number HHS-OCIO-2012-001)

☒ I agree to the Terms & Conditions

Back

Next

Cancel

Click on the **I agree to the Terms & Conditions** checkbox and then select **Next**.

Requesting Access – Identity Verification Step 3

The **Enter Your Information** page displays.

CMS.gov | My Enterprise Portal My Apps EPPE User Help Log Out

Step #3: Enter Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.

All fields are required unless marked 'optional'.

First Name EPPE	Middle Name (optional)	Last Name User	Suffix (optional) ▼
Social Security Number ••••••••	Birth Month January ▼	Birth Date 1 ▼	Birth Year 1960 ▼

Is Your Address US Based?
☒ Yes ☐ No

Home Address Line 1 Home Address One	Enter Home Address Line 2 (optional)		
City City	State Maryland ▼	ZIP Code 21075	Enter ZIP+4 Code (optional)
Phone Number 410-410-4100			
Email Address eppeuser1@eppe.com	Confirm Email Address eppeuser1@eppe.com		

☒ Check here if you have read and verified the information above is accurate and complete as required by Identity Verification.

[Back](#) [Next](#) [Cancel](#)

Check the box verifying the information you entered and click **Next**.

Requesting Access – Identity Verification Step 4

The **Verify Your Identity** page displays.

CMS.gov | My Enterprise Portal My Apps EPPE User Help Log Out

Step #4: Verify Your Identity

1. Your credit file indicates you may have an auto loan/lease, opened in or around May 2006. Who is the credit provider for this account?

- ☐ ACCION USA
- ☐ CHASE
- ☐ REPUBLIC BANK
- ☐ WINTRUST FINANCIAL
- ☐ NONE OF THE ABOVE

2. What is the total monthly payment for the above-referenced account?

- ☐ \$175 - \$224
- ☐ \$225 - \$274
- ☐ \$275 - \$324
- ☐ \$325 - \$374
- ☐ NONE OF THE ABOVE

3. Your credit file indicates you may have a student loan, opened in or around November 2002. Who is the credit provider for this account?

- ☐ LIBERTY FINANCE
- ☐ MITSUBISHI ACCEPT. CORP.
- ☐ SALLIE MAE
- ☐ WFS FINANCIAL
- ☐ NONE OF THE ABOVE

4. What is the total monthly payment for the above-referenced account?

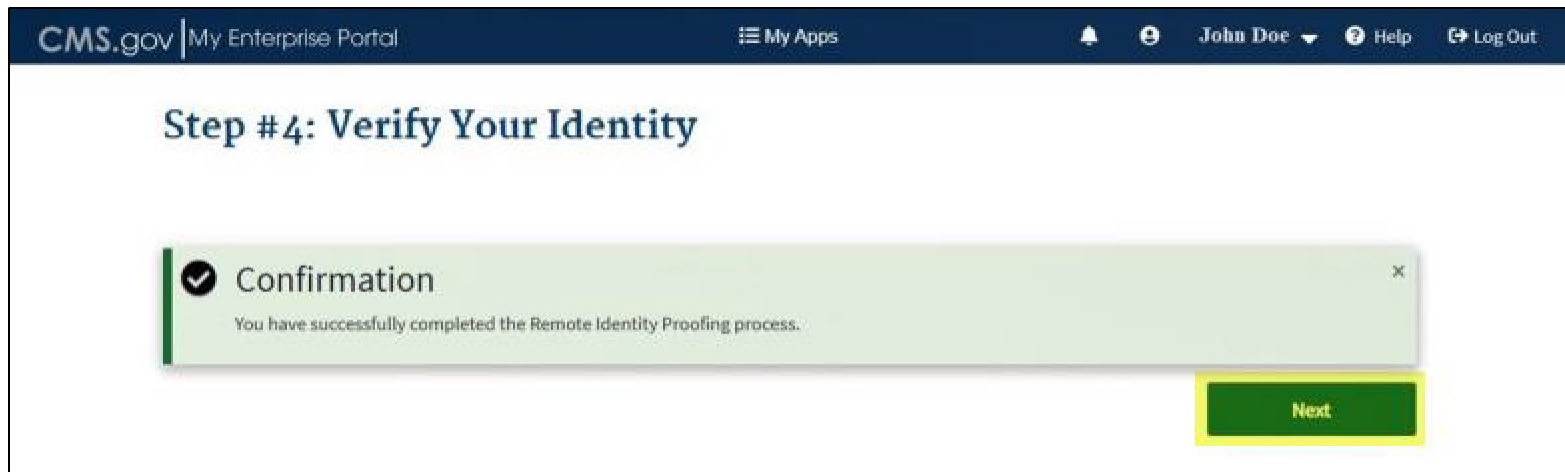
- ☐ \$50 - \$74
- ☐ \$75 - \$99
- ☐ \$100 - \$124
- ☐ \$125 - \$149
- ☐ NONE OF THE ABOVE

[Back](#) [Next](#) [Cancel](#)

Provide an answer to each question and then click **Next**.

Requesting Access – Identity Verification Confirmation

The Verify Your Identity **Confirmation** page displays.



1. The confirmation message, ***“You have successfully completed the Remote Identity Proofing process”*** displays.
2. Click **Next**.

Requesting Access – Role Details

The **Request Application Access** page displays.

The screenshot shows the 'Request Application Access' page on the CMS.gov My Enterprise Portal. The page has a dark blue header with the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a bell icon, 'EPPE User', 'Help', and 'Log Out'. The main content area is white and contains a section titled 'Request Application Access'. Below this title are five steps in a numbered list:

- 1 Select an Application**
A green checkmark is next to 'EPPE'. To the right, there is a green checkmark, the word 'Completed', and a blue 'Edit' link.
- 2 Select a Role**
A green checkmark is next to 'EPPE User'. To the right, there is a green checkmark, the word 'Completed', and a blue 'Edit' link.
- 3 Complete Identity Verification**
A green checkmark is next to 'Identity Verification'. To the right, there is a green checkmark and the word 'Completed'.
- 4 Enter Role Details**
Below the title, it says 'All fields are required unless marked 'optional''. There is a yellow rectangular input field with the placeholder text 'Enter EPPE Organization Name'. To the right of this field is a green 'Next' button.
- 5 Enter Reason for Request**
This step is currently empty.

At the bottom right of the form, there is a blue 'Cancel' link.

Enter the Organization name and click **Next**.

Requesting Access – Reason for Request

The Request Application Access page displays.

The screenshot shows the 'Request Application Access' page in the CMS.gov My Enterprise Portal. The page has a dark blue header with the CMS.gov logo, 'My Enterprise Portal', and navigation links for 'My Apps', 'EPPE User', 'Help', and 'Log Out'. The main content area is titled 'Request Application Access' and contains five numbered steps:

- 1 Select an Application**: Shows 'EPPE' with a green checkmark and 'Completed' status. A blue 'Edit' link is visible.
- 2 Select a Role**: Shows 'EPPE User' with a green checkmark and 'Completed' status. A blue 'Edit' link is visible.
- 3 Complete Identity Verification**: Shows 'Identity Verification' with a green checkmark and 'Completed' status.
- 4 Enter Role Details**: Includes the instruction 'All fields are required unless marked 'optional''. A text input field for 'EPPE Organization Name' contains the value 'CMS'. A green 'Completed' status and a blue 'Edit' link are shown.
- 5 Enter Reason for Request**: Features a large light blue text area with a yellow placeholder box containing the text 'Enter a Reason for Request'. A green 'Submit' button is located at the bottom right of this section, and a blue 'Cancel' link is at the bottom of the page.

Enter the Reason for the Request and click **Submit**.

Requesting Access – Confirmation Request

The **Confirmation** page displays.

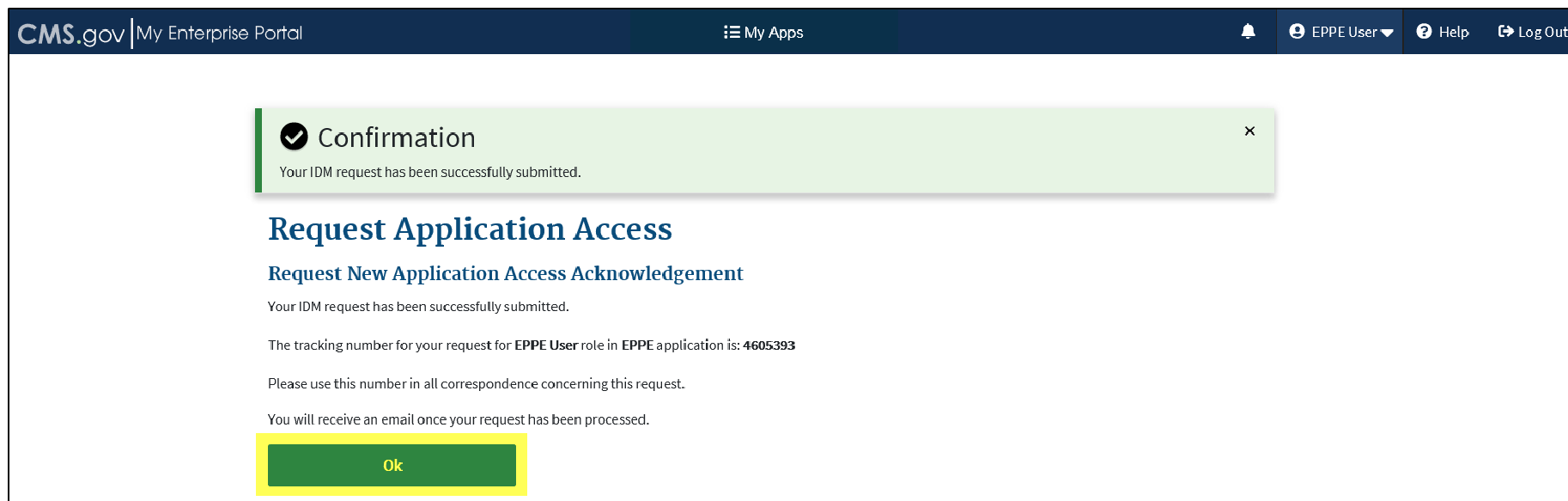
Confirmation ×

Are you sure you want to proceed?

Click **OK** to proceed with the Application Access Request.

Requesting Access - Confirmation

The **Request Application Access Confirmation** page displays.



The screenshot displays the CMS.gov My Enterprise Portal interface. At the top, the navigation bar includes the CMS.gov logo, 'My Enterprise Portal', a 'My Apps' menu, and user controls for 'EPPE User', 'Help', and 'Log Out'. A green confirmation banner at the top of the main content area states: 'Confirmation: Your IDM request has been successfully submitted.' Below this, the section is titled 'Request Application Access' and 'Request New Application Access Acknowledgement'. It confirms the submission of the IDM request and provides a tracking number: '4605393' for the 'EPPE User' role in the 'EPPE' application. It also instructs the user to use this number in all correspondence and notes that an email will be sent once the request is processed. At the bottom of the content area, there is a green 'Ok' button highlighted with a yellow border.

CMS.gov | My Enterprise Portal

My Apps

EPPE User ▼ Help Log Out

✓ Confirmation ×
Your IDM request has been successfully submitted.

Request Application Access

Request New Application Access Acknowledgement

Your IDM request has been successfully submitted.

The tracking number for your request for **EPPE User** role in **EPPE** application is: **4605393**

Please use this number in all correspondence concerning this request.

You will receive an email once your request has been processed.

Ok

Click **OK** to return to the **Enterprise Portal** page.

Requesting Access – My Access

The **My Access** page displays.

The screenshot shows the CMS.gov My Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a notification bell, 'EPPE User', 'Help', and 'Log Out'. The main heading is 'My Access'. Below it are two tabs: 'My Roles' and 'My Pending Requests' (which is active). A message states: 'The following is a list of pending requests submitted for approval.' Below this is a table with columns: Request ID, Application, Role Name, Attributes, Submission Date, Expiration Date, and Action. A single record is shown with Request ID 4605393, Application EPPE, Role Name EPPE User, Attributes EPPE Organization Name: CMS, Submission Date Feb 5, 2020, and Expiration Date Feb 6, 2020. The Action column contains a red 'Cancel' button. At the bottom, it says 'Showing 1 of 1 record.' and has pagination controls for 1 of 10 items.

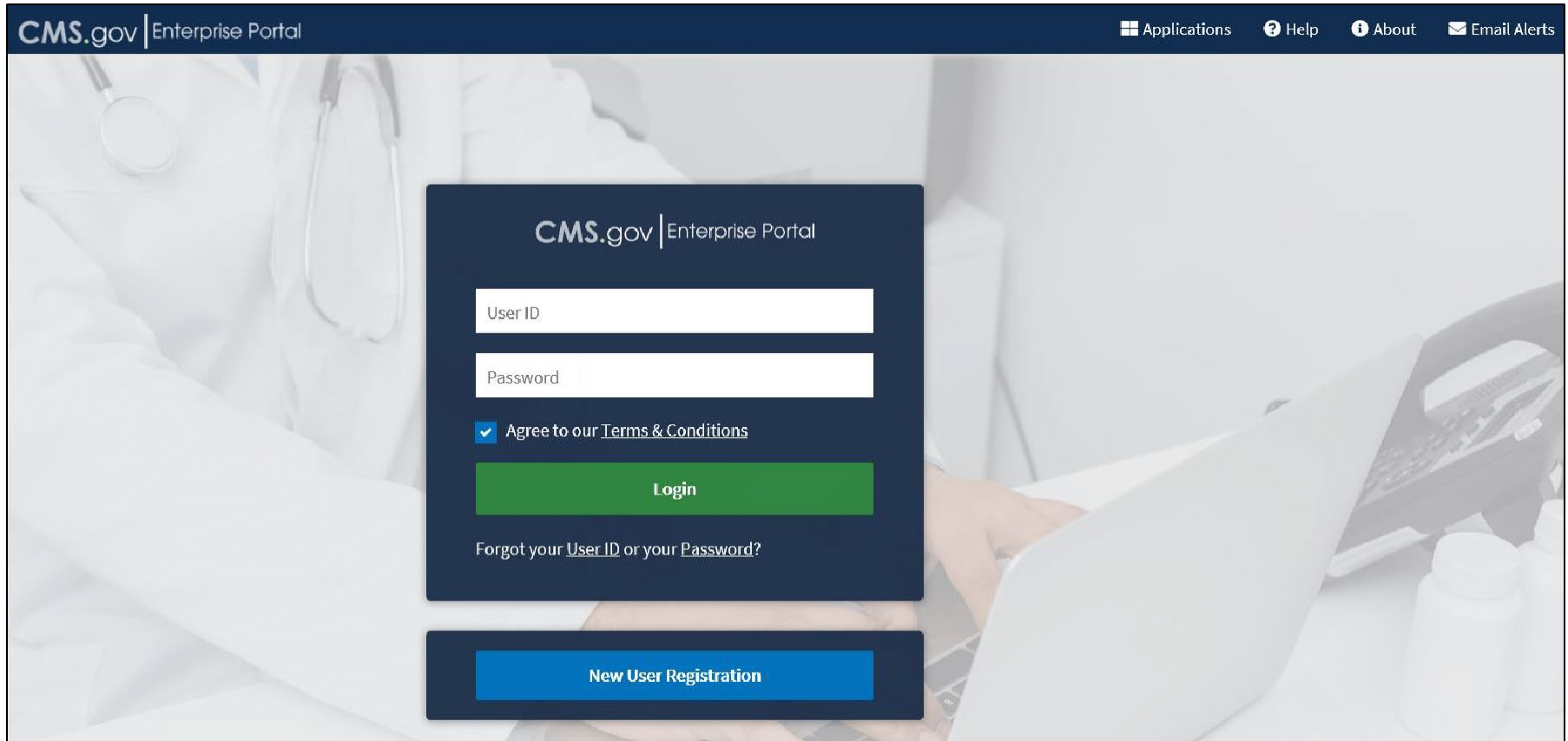
Request ID	Application	Role Name	Attributes	Submission Date	Expiration Date	Action
4605393	EPPE	EPPE User	EPPE Organization Name: CMS	Feb 5, 2020	Feb 6, 2020	Cancel

At this point the Application Access Request is complete. The request must be approved. An email will be sent once the pending request is approved. After access is granted, log into the Enterprise Portal.

Note: If the request was entered in error click on **Cancel** under the **My Pending Request** tab.

Requesting An EPPE Application Role - Login

Go to the **CMS.gov** website: <https://portal.cms.gov>



CMS.gov | Enterprise Portal

Applications Help About Email Alerts

CMS.gov | Enterprise Portal

User ID

Password

☒ Agree to our [Terms & Conditions](#)

Login

Forgot your [User ID](#) or your [Password](#)?

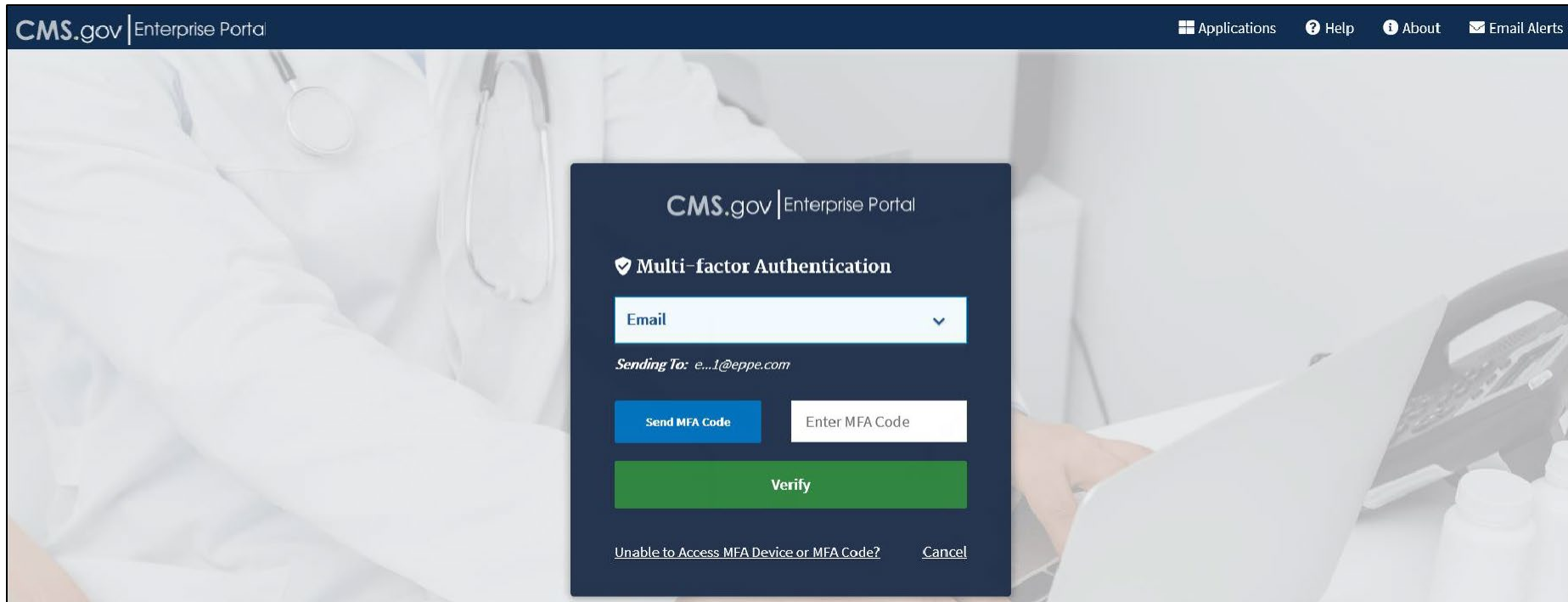
New User Registration

Enter your Login Credentials.

Click **Login**.

Requesting An EPPE Application Role – Multi-Factor Authentication

The **Multi-factor Authentication** page displays.



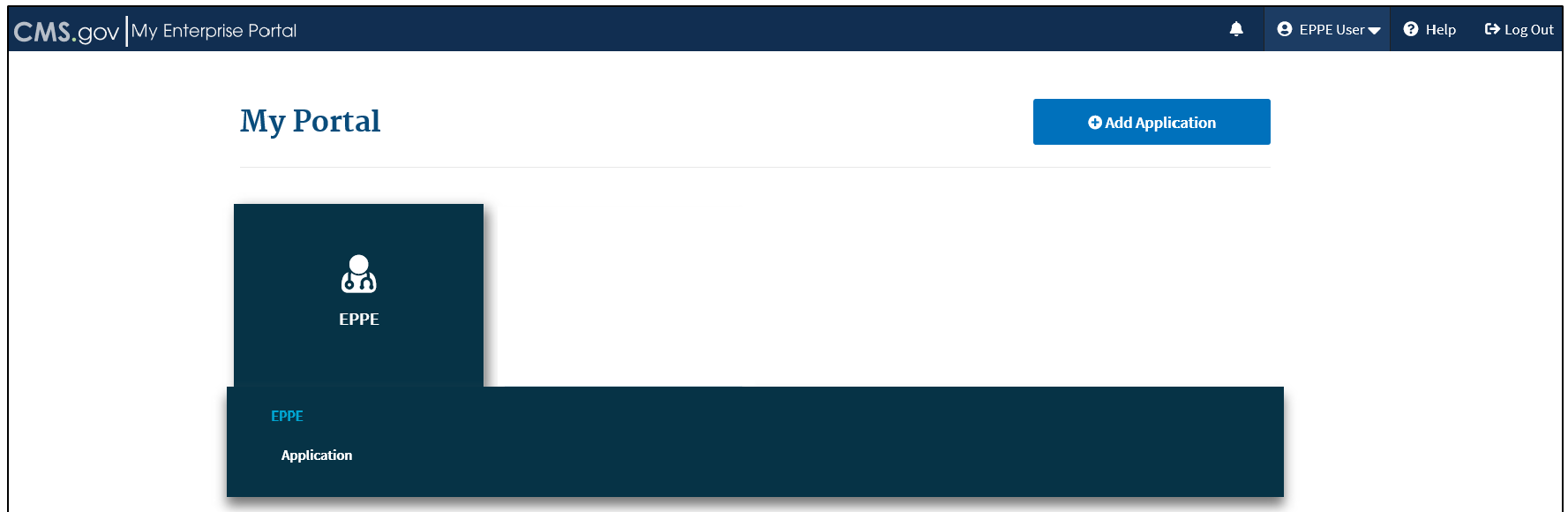
The screenshot shows the CMS.gov Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, 'Enterprise Portal', and links for Applications, Help, About, and Email Alerts. The main content area features a modal window titled 'Multi-factor Authentication'. Inside the modal, there is a dropdown menu with 'Email' selected. Below the dropdown, it says 'Sending To: e...1@eppe.com'. There are two buttons: 'Send MFA Code' (blue) and 'Enter MFA Code' (white). Below these is a green 'Verify' button. At the bottom of the modal, there is a link 'Unable to Access MFA Device or MFA Code?' and a 'Cancel' link.

The Email option was selected as the Multi-factor Authentication method. Click on **Send MFA Code**. Once the email is received, enter the MFA Code in the **Enter MFA Code** field and click on **Verify**.

Note: Email is the default options and will always be available in the dropdown list. Depending on the user's registrations of other MFA devices, the list may vary.

Requesting An EPPE Application Role – My Portal

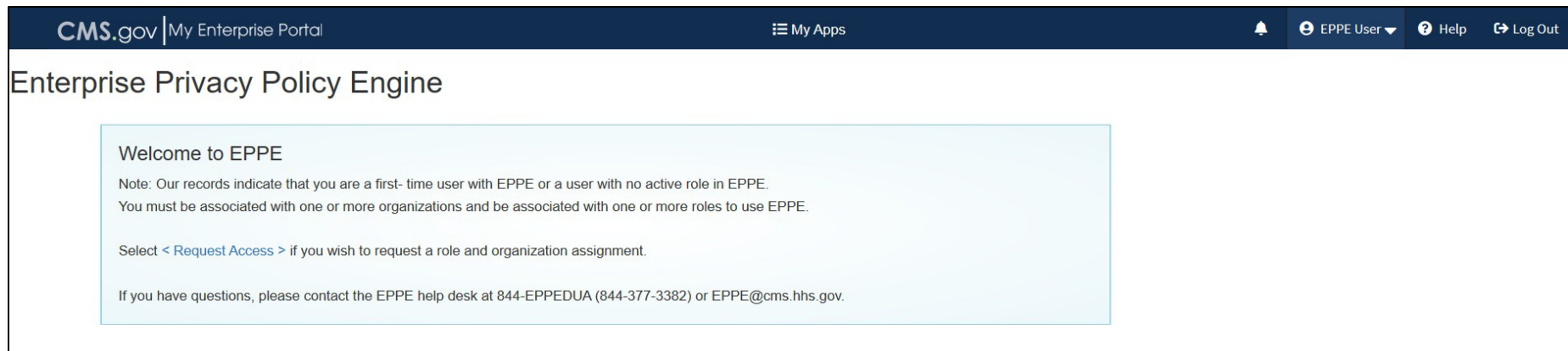
The **My Portal** page displays.



Click on the **EPPE** tile and then on the **Application** link.

Requesting An EPPE Application Role – Request Access

The **EPPE First-Time User** page displays.



The screenshot shows the 'Enterprise Privacy Policy Engine' (EPPE) first-time user interface. At the top is a dark blue navigation bar with 'CMS.gov | My Enterprise Portal' on the left, 'My Apps' in the center, and 'EPPE User', 'Help', and 'Log Out' on the right. Below the navigation bar, the page title 'Enterprise Privacy Policy Engine' is displayed. The main content area features a light blue box with the following text: 'Welcome to EPPE', a note about first-time users, a requirement to be associated with organizations and roles, a link to 'Request Access', and contact information for the EPPE help desk.

CMS.gov | My Enterprise Portal

My Apps

EPPE User Help Log Out

Enterprise Privacy Policy Engine

Welcome to EPPE

Note: Our records indicate that you are a first- time user with EPPE or a user with no active role in EPPE.
You must be associated with one or more organizations and be associated with one or more roles to use EPPE.

Select < [Request Access](#) > if you wish to request a role and organization assignment.

If you have questions, please contact the EPPE help desk at 844-EPPE DUA (844-377-3382) or EPPE@cms.hhs.gov.

Click the **Request Access** link to start the role selection process.

Requesting An EPPE Application Role – Step 1

The **EPPE Role Request** page displays.

The screenshot shows the 'Enterprise Privacy Policy Engine' interface. At the top is a dark blue header with 'CMS.gov | My Enterprise Portal', 'My Apps', a notification bell, 'EPPE User', 'Help', and 'Log Out'. Below the header, the page title 'Enterprise Privacy Policy Engine' is displayed. The main content area contains two sections. The first section, titled 'REQUEST ROLE IN EPPE', has a light blue background and contains two required fields: 'Organization Name *' with a search input and a link 'Cannot locate your Organization?', and 'Role *' with a dropdown menu labeled 'Select an Option'. An 'Add' button is at the bottom of this section. The second section, titled 'YOUR SELECTIONS', contains a table with four columns: 'Organization Name', 'Role', 'Data Dissemination System', and 'Action'. Below the table is an 'Exit' button.

Organization Name	Role	Data Dissemination System	Action
-------------------	------	---------------------------	--------

1. Enter at least 3 characters of your **Organization Name** and then select it from the drop-down list.
2. Click the appropriate Role from the drop-down.
3. Click the **Add** button.

Note: You must select your **Organization Name** from the dropdown list before appropriate roles display in the **Role** field.

Requesting An EPPE Application Role – Step 2

The **EPPE Role Request** page displays.

The screenshot shows the 'Enterprise Privacy Policy Engine' interface. At the top is a dark blue header with 'CMS.gov | My Enterprise Portal' on the left, 'My Apps' in the center, and user controls on the right including a bell icon, 'EPPE User', 'Help', and 'Log Out'. Below the header, the main content area is titled 'Enterprise Privacy Policy Engine'. It contains two main sections: 'REQUEST ROLE IN EPPE' and 'YOUR SELECTIONS'. The 'REQUEST ROLE IN EPPE' section has a search bar for 'Organization Name' with a red asterisk, a placeholder 'Search by entering at least 3 cha', and a yellow tooltip that says 'Cannot locate your Organization?'. Below this is a 'Role' dropdown menu with a red asterisk and the text 'Select an Option'. An 'Add' button is at the bottom of this section. The 'YOUR SELECTIONS' section features a table with four columns: 'Organization Name', 'Role', 'Data Dissemination System', and 'Action'. Below the table is an 'Exit' button.

REQUEST ROLE IN EPPE

Organization Name *: Search by entering at least 3 cha [Cannot locate your Organization?](#)

Role *: Select an Option

Add

YOUR SELECTIONS

Organization Name	Role	Data Dissemination System	Action
-------------------	------	---------------------------	--------

Exit

If the Organization is not listed, click the **Cannot locate your Organization?** link to submit a request to add an organization.

Requesting An EPPE Application Role – Step 3

The EPPE Role Request page displays.

The screenshot shows the 'Enterprise Privacy Policy Engine' (EPPE) interface. At the top is a navigation bar with 'CMS.gov | My Enterprise Portal', 'My Apps', and user controls. The main heading is 'Enterprise Privacy Policy Engine'. Below it is a 'REQUEST ROLE IN EPPE' form with fields for 'Organization Name' (set to 'CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS)' with a 'Cannot locate your Organization?' link) and 'Role' (set to 'CMS CONTACT (COR)'). An 'Add' button is below these fields. Underneath is a 'YOUR SELECTIONS' section containing a table with one entry. At the bottom are 'Submit' and 'Exit' buttons. An 'ATTESTATION' popup is on the right, containing a statement about mandatory training, an 'I agree' checkbox, and a 'NEXT' button.

Organization Name	Role	Data Dissemination System	Action
1 CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS)	CMS CONTACT (COR)		Edit Remove

1. The Attestation message displays, ***“Agreeing to this statement confirms that I have completed the mandatory training for the role that I am requesting, as specified on the EPPE web page.”*** including a link to the EPPE page on CMS.gov.
2. Click the **I agree** checkbox.
3. Click the **Next** button.

Note: The **Attestation** popup will only display for the **DUA Requester** and **CMS Contact (COR)** roles.

Requesting An EPPE Application Role – Step 4

The **EPPE Role Request** page displays.

CMS.gov | My Enterprise Portal My Apps EPPE User Help Log Out

Enterprise Privacy Policy Engine

REQUEST ROLE IN EPPE

Organization Name *: CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS) Cannot locate your Organization?

Role *: CMS CONTACT (COR) X

Add

YOUR SELECTIONS

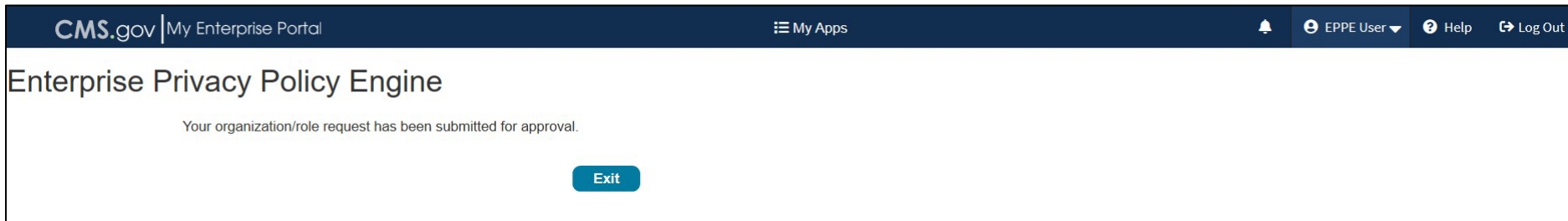
	Organization Name	Role	Data Dissemination System	Action
1	CENTERS FOR MEDICARE AND MEDICAID SERVICES (CMS)	CMS CONTACT (COR)		Edit Remove

Submit **Exit**

1. The **Selection** displays in the table.
2. Select the **Submit** button.

Requesting An EPPE Application Role – Step 5

The **EPPE Role Request Acknowledgement** page displays.



1. The **EPPE** role request submission acknowledgement displays the message, ***"Your organization/role request has been submitted for approval."***
2. The **EPPE Administrator** will review for approval.
3. Select the **Exit** button.

EPPE Help Desk Information

The EPPE Help Desk is available to assist with any questions or concerns.



EPPE Help Desk Contact Information

Hours of Operation: Monday – Friday 9:00 AM to 6:00 PM EST

844-EPPE-DUA (844-377-3382)

eppe@cms.hhs.gov